

#### **ISD Branch Status Review**

Number: 580-TM-023-01 Approved By: (signature)

Effective Date: June 1, 2005 Name: Joe Hennessy

**Expiration Date:** June 1, 2009 Title: Chief, ISD

**Responsible Office:** 580/Information Systems Division (ISD)

Asset Type: Template

Title: ISD Branch Status Review (BSR)

PAL Number: 1.4.3.4

**Purpose** 

The purpose of this document is to provide a template for use in producing an ISD Branch Status Review (BSR). This template is intended to be used by ISD project personnel in preparing mission software planning and status information that MUST be presented to ISD Branch Management in regularly scheduled ISD Branch Management Reviews.

Scope

This template is to be used for all ISD mission software projects. Such projects may or may not be part of a larger, mission-level project.

General Tailoring Conventions

The slides in this template provide recommendations on how project-specific planning and status information may be organized, packaged, and presented to Branch Management. All components of the BSR template MUST be addressed, however, the level of detail of the BSR should be commensurate with the scope and complexity of the project. Slides may be added where necessary, but existing template slides should not be deleted.

Guidance slides at the back of the template provide additional advice on preparing the BSR slides.

# General Tailoring Conventions

This template is **NOT** intended to prescribe:

- A specific order for presentation of information
- A specific format or layout for the required information
- The maximum set of information that may be presented

Projects are free to add any information they deem appropriate.

In the target BSR, the introductory slides (i.e., these lead pages containing the Document Header, "Purpose", "Scope", "Style Conventions", "General Tailoring Guidelines", and "Template Change History") as well as the guidance slides at the back of the template should be deleted.

#### Template Change History

Version	Date	Description of Development Changes
1.0	June 1, 2005	Approved by the ISD CCB.

# <Project> Status

<Month/Year>
<Preparer>

For additional information, please refer to the Branch Status Review Guidance slides located at the back of this template.

### **Overall Project Status**

#### Summarize the overall state of the project

- Present major "message(s)" you want Branch Management to know about the status of your project
- Use only 1 text slide to set the stage for what follows
- Use a second slide to present a three month G/Y/R temperature chart (Optional)

#### This is NOT the slide to present:

- Detailed status in a series of bullets
- A list of issues or concerns
- A list of major accomplishments

#### Sample "Messages":

- Implementation of Release 2 is two weeks ahead of schedule; the test team is preparing to start testing earlier than planned
- Interface testing with the customer's system is showing good results; customer satisfaction is high
- Delays in receipt of user requirements may impact the SRR; meetings are in progress with the user
- Project is fully staffed; added three people to the team as planned

# **Overall Project Status Chart**

DOCUM	MENTA	TION		DEPE	NDEN	CIES		INFRASTRUCTURE/PROCESS			
	June	July	Aug		June	July	Aug		June	July	Aug
Product Plan				Algorithms				PRs			
Test Plan				Hardware ICDs				Desktop Sys.			
CM Plan				Special H/W				Devel. Lab(s)			
Requirements				Spacecraft SiM's				Build Test Lab			
ICDs				Instrument SiM's				Sys. Test Lab			
Ops. Concept				Power GSE				CM Sys.			
User's Guide				Ground Sys.				DR Sys.			
<u> </u>				Ou	,						
<del></del>											
				Ground Sys.							
RE	VIEW	<u>S</u>	•	DEVEL/TE	RES	SOURCE	S				
	June	July	Aug		June	July	Aug		June	July	Aug
Project Reviews				Code				CPU			
Requirements				Integration Test				Memory			
Design				Database(s)				Bus Utilization			
Test Readiness				Build Test							
AT Test Results				System Test				Schedule			
								I&T Readiness			
								Budget			
								Staff			
		-		of cost, schedule or	techni	cal qu	ıality i	mpact.			
				, may result in Red							
	Greer	n - No	issue	s or problems							

# **Staffing Summary (1 of 2)**

#### Monthly Planned vs Actual / Projected Staffing (FTEs)

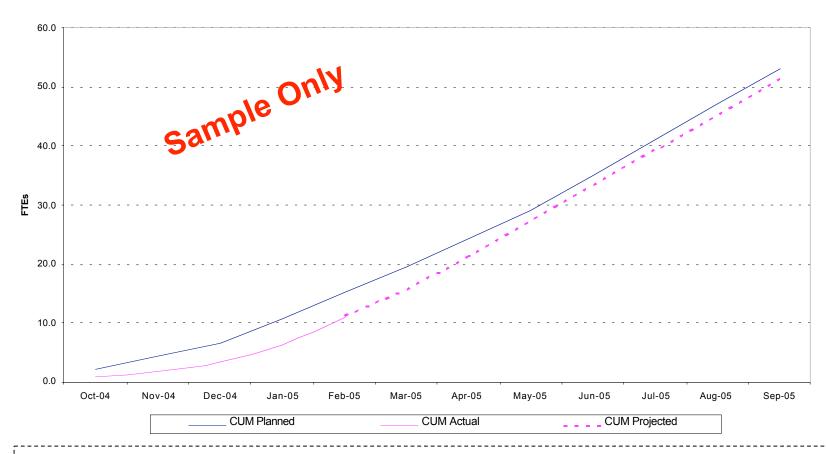


#### **Staffing Status:**

Project was under-staffed for the first 4 months; additional staff has been identified and will be added to the team earlier than originally planned.

# **Staffing Summary (2 of 2)**

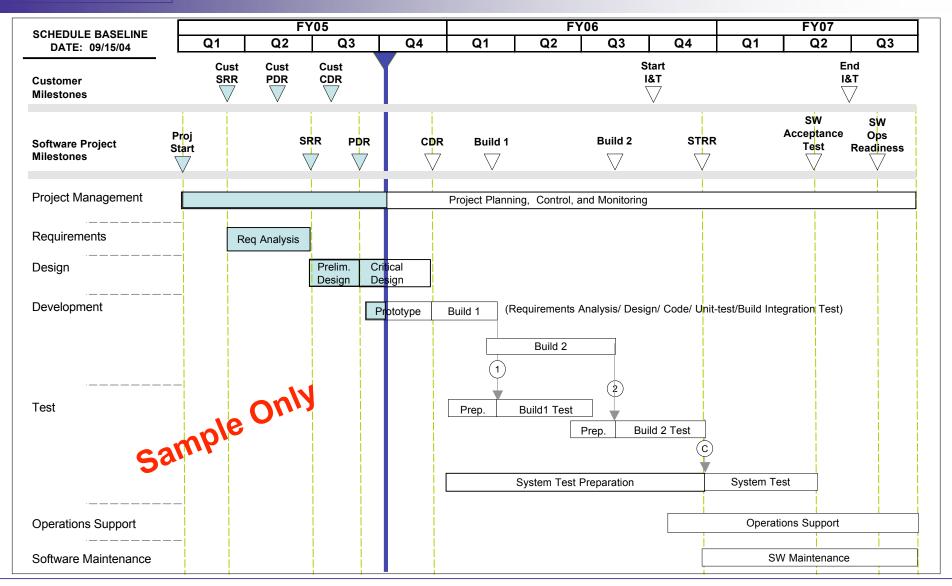
#### Cumulative Planned vs Actual / Projected Staffing (FTEs)



#### **Staffing Status:**

Projected staff-up will not meet the planned, required staffing. We are working with the customer to reduce or eliminate some of the work originally planned to be performed.

## **Project Schedule Overview**



# **Project Detailed Status**

SCHEDULE BASELINE DATE: 09	/15/04												
WBS / Activities		Oct-04	Nov-04	Dec-04	Jan-05	Feb-05	Mar-05	Apr-05	May-05	Jun-05	Jul-05	Aug-05	Sep-05
Life-Cycle Milestones					▼ SRR		abla PDR		▽ CDR				1
Management		SMP Drft	SMP Fin				SMP Rev 1			SMF Rev			
System Engineering			I/F Anal (P)	ICDs (R)		Ds Ma F) Bi		ICDs Revision 1					
Requirements Analysis				Sys Req (P)	Sys Req (R)	Sys Req (F)	Sys R Revisio √	n 1	Sys Req Revision 2				
Configuration Management		CM Plan Review	CM Plan Approved			Req Baseline	CM Audit 1					Bld 1 Baseline	
Hardware Development				AV.			Order Test Equip	O	rder Ops Equip	Install T Equip			tall Ops Equip
Software Development		amk	le O			Proof of Concept			Prototy	pe		Build 1 To Test	
Software/System Testing	5				Test Plan Review	Test Plan Approved			Test Scena Approve		Env Up		
Operations Support													
Software Maintenance													

### **Accomplishments**

- State your project's accomplishments for the reporting period
   All accomplishments must be stated in terms of:
  - Planned Activities (for this reporting period)
  - Accomplishments (for this reporting period)
  - Future Plans (at a minimum, for the next reporting period)
    - Consider organizing this slide under a high level breakout that is appropriate for your project – for example: Project phases (e.g., development / test / operations);
       Major systems or subsystems; Project Teams (e.g., engineers / developers / testers) – with each of the 3 bullets listed above under each high level breakout.

#### Address both technical and support accomplishments

- Technical accomplishments include items such as completing product deliverables, meeting milestones, participating in significant customer events, etc.
- Support accomplishments include items such as structuring your project WBS, completing your project plan, putting a project metrics repository in place, approving a supplier agreement, developing action plans, etc.
- Include items that do and don't appear on your detailed schedule
  - See additional guidance located at the back of this template for the types of support accomplishments that must be reported.

### **Deliverables / Receivables / Commitments**

- List all project deliverables, receivables, and commitments:
  - For the current reporting period
  - For at least the next two reporting periods (and further in the future if of particular criticality or interest (e.g., deliver to I&T)

#### List must include, at a minimum:

- Name of the deliverable, receivable, or commitment item
- An indicator of the type of item (i.e., deliverable, receivable, or commitment)
- Both planned and actual dates for each item
  - Consider using the following table to provide this information. Other formats are acceptable as long as they include the requisite information.

Deliverables / Receivables / Commitments	Туре	Planned	Actual	Notes / Comments / Schedule Analysis
FY05 Funding Approved	Onl	10/01/04	12/15/04	Acceptable funding approved. No impact on delay of receipt of approval.
Configuration Management Plan	D	11/01/04	11/01/04	Distribution to all parties completed on schedule.
User Requirements	R	01/15/05		

5/31/05

### **Technical Issues and Concerns**

- Provide a brief description of each technical issue/concern for the purposes of:
  - Bringing them to management's attention
  - Obtaining management direction
  - Soliciting management's assistance in resolving

For each issue/concern, present a clear, concise statement of at least:

- The issue or concern
- An analysis of the issue/concern including the specific impact(s) on your project and specific internal and external groups/personnel that may be affected or need to be involved in resolving the issue/concern
- What action(s) are planned and the dates the actions are planned to complete
- Current progress against the action plan including actual completion date(s)
  - See additional guidance located at the back of this template for a format for presenting this information. Other formats are possible including snapshots of spreadsheets containing this information.

### **Management Issues and Concerns**

- Provide a brief description of each management issue/concern for the purposes of:
  - Bringing them to senior management's attention
  - Obtaining senior management direction
  - Soliciting senior management's assistance in resolving

#### Include only management-related topics such as:

- Staff Changes
- Staff Issues
- Funding/Contract Issues

#### For each issue/concern, present a clear, concise statement of at least:

- The issue or concern
- An analysis of the issue/concern including the specific impact(s) on your project and specific internal and external groups/personnel that may be affected or need to be involved in resolving the issue/concern
- What action(s) are planned and the dates the actions are planned to complete
- Current progress against the action plan including actual completion date(s)
  - See additional guidance located at the back of this template for a format for presenting this
    information. Other formats are possible including snapshots of spreadsheets containing this
    information.

## **Risk Summary**

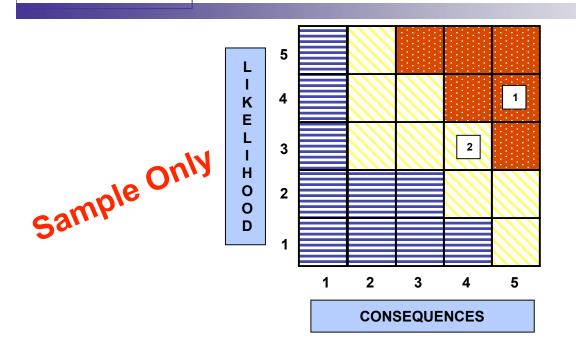
Provide a summary of each major project risk and a risk matrix

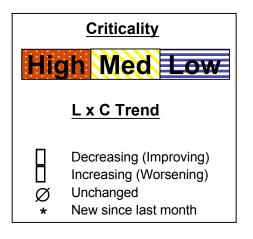
Include, at a minimum, all "RED" risks

In addition to the matrix entries for each risk, present a clear, concise statement of at least:

- The Risk
- Mitigation Strategy
- Date Last Revisited
- Status including information on current activities and, as deemed important, time period that risk is active, event/date that triggers the risk's mitigation, etc.
  - Consider using the next slide as an example of how to provide this information. Other formats are acceptable as long as they include the requisite information.

# **Risk Summary**





LxC Trend	Rank	Risk ID	Description	Mitigation Strategy	Date Last Revisited	Status
	1	2004-01	Possibility of fire in building	Install fire extinguishers; backup data Trigger date: 9/1/04	November 1, 2004	All fire extinguishers replaced; data not yet backed up
	2	2003-03	EPG chair may get sick, but has no deputy	Hire a deputy Trigger date: 8/1/04	October 1, 2004	Closed: new deputy on board
	3					

### **Project Metrics**

- Prepare one or more slides that address project measures
  - ISD-required project measures
  - Project-specific measures including Risk Management Metrics
    - See guidance located at the back of this template for a list of project measures to be reported

Charts or graphs are preferred, with words to show an analysis of the metrics (i.e., describe the essence of what the chart is showing).

- For example: A chart showing software progress using point counting may include words such as "Development is proceeding as planned" or "Development is 2 weeks behind schedule"
  - See template slides "Staffing Summary (x of 2)" for examples of charts with accompanying words that describe analysis of the data in the chart

# **Backup Charts**

Optionally Include any backup charts for reference or for historical purposes

# **BSR Template Guidance**

The following pages provide additional guidance and examples of formats for the slides in this template.

### BSR Guidance: Staffing Summary Slides

#### Minimum Requirements:

- Slides must address the project's staffing status in terms of planned versus actual staffing – use of full time equivalents (FTEs) is preferred
- At least one representation of the data (either monthly or cumulative) must be included – use of both is preferred
- Data must cover at least the current report period current fiscal year is preferred
- Your analysis of the data must be described
- Preferred method of presentation:
  - Chart or graph showing planned versus actual FTEs, with words accompanying the chart/graph that describe your analysis of the data
- See template slides "Staffing Summary (x of 2)" for examples

# BSR Guidance: Project Schedule Overview Slide

- Minimum Requirements:
  - Slide must address the project's overall schedule AND progress against that schedule
- Preferred method of presentation:
  - Any schedule format that can demonstrate both planned activities AND progress against those activities
- See template slide "Project Schedule Overview" for an example.

# BSR Guidance: Project Detailed Status Slide

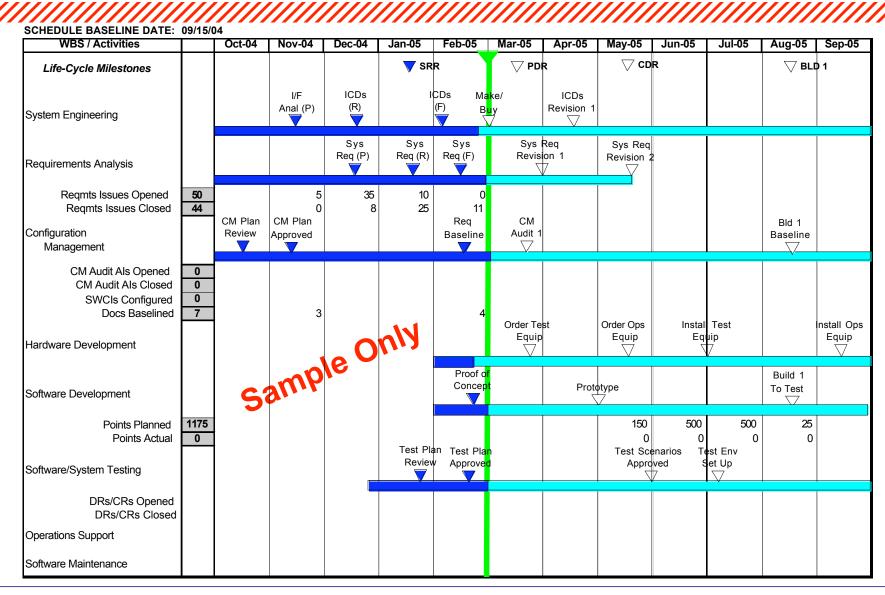
### Minimum Requirements:

- Slide must address the project's detailed schedule and progress against that schedule
- Schedule must include major activities and major milestones to be met for each activity
- Preferred method of presentation:
  - Any schedule format that can demonstrate both planned activities AND progress against those activities
- Options to consider:
  - Major activities should include both technical AND support activities/ milestones. However, if support activities/milestones are NOT included on this slide, they must at least be addressed within the context of all subsequent slides of the presentation
- See template slide "Project Detailed Status" for an example showing only technical activities/milestones
- See the next two guidance slides for an example showing both technical AND support activities/milestones

### BSR Guidance: Sample Project Detailed Status Slide (1 of 2)

	Oct-04	Nov-04	Dec-04	Jan-05	Feb-05	Mar-05	Apr-05	May-05	Jun-05	Jul-05	Aug-05	Sep-05
	CMD	CMD		▼ SI	RR	V	OR .	△ CI			▽ BL	.D 1
	Drft	Fin				SMP Rev 1			ا م		N	
	3.5	3.5	3.5	3.5	4.0	4.0	4.5	6.0	mple	6.0	6.0	5.0
55.5	3.5	7.0	10.5	14.0	18.0	22.0	26.5	22.5	38.5	44.5	50.5	55.5
15.5												15.5
					_		_	Rev Vers			Rev Vers	
	R	Proj epository						1 -	1 - 1			
59 36	12 5 SAM Tyr	6 8	0 3	_	15 18	Supp Prod		_	Prod 1	Prod (		
				Place		Selected			1			
			Process Aud 1	1		Product Aud 2	Process Aud 3	Product Aud 3	1 1			
55 38	Meast ID			Assets Col		,	sis		1 1	is		Analysis Q4
	59 36	SMP Drft 3.5 2.0 55.5 15.5 2.0 Es Rev 9 12 36 5 SAM Ty Identifie 9 QA Plan Review 4 9 9 9 9 9 9 9 9 9 9 9 9 9 9 9 9 9 9	SMP SMP Fin	SMP Drift Fin	SMP   SMP   Fin	SMP   SMP   Fin	SMP Drft Fin SMP Rev 1  3.5 3.5 3.5 3.5 3.5 4.0 4.0 4.0 2.0 2.0 3.5 4.0 4.0 18.0 22.0 15.5 15.5 15.5 15.5 15.5 15.5 15.5 15	SMP   SMP   Fin   SMP   Rev 1   SMP   SM	SMP   SMP   Drift   Fin   Fin   SMP   Rev 1   SMP   SMP	SMP   SMP   Drft   Fin   SMP   SMP   Rev 1   SMP   SMP   Rev 2   SMP   SMP   Rev 2   SMP   SMP	SMP   SMP   SMP   Rev 1	SMP   SMP   SMP   SMP   Rev 1   SMP   Rev 2   SMP   SM

### BSR Guidance: Sample Project Detailed Status Slide (2 of 2)



### BSR Guidance: Accomplishments Slide

#### Minimum Requirements:

- Slide must address the project's accomplishments for this reporting period in terms of what was planned for this period, what was completed, and what is planned for the upcoming period
- Slide must include accomplishments both technical AND support activities
- As appropriate, discuss involvement of other groups/personnel (i.e., "stakeholders") in the achieving completion of the activity/milestone
- Preferred method of presentation:
  - Any format that can demonstrate both technical and support accomplishments in the context described above
  - Focus only on accomplishments (e.g., milestones that are met, activities that are completed) during this reporting period
- See the next two guidance slides for examples of support activities/milestones that must be addressed (as appropriate for this reporting period)
- See guidance slides 26 and 27 for examples of accomplishments slides

### BSR Guidance: Sample Support Activities/Milestones (1 of 2)

As appropriate for the reporting period, address support activities and milestones such as those listed in the boxes on this and the next slide.

#### **Project Planning**

- Defined the WBS
- Estimated project costs
- Established project schedules
- Selected and documented the project life cycle
- Identified project risks
- Planned the budget against the schedule

#### **Supplier Agreement Monitoring**

- · Determined type of acquisition
- Selected suppliers
- · Established / maintained supplier agreements
- Reviewed candidate COTS products
- Worked with the supplier as specified in the supplier agreement
- Accepted acquired products
- Transitions acquired products to the project

#### **Project Monitoring & Control**

- Collected and tracked project progress
- · Held regular monitoring meetings
- Prepared for and presented milestone reviews
- Monitored stakeholder involvement
- · Presented issues to management
- Monitored and actively managed risks
- Tracked data management
- Obtained and tracked commitments

#### **Process and Product Quality Assurance**

- Negotiated software assurance support with Code 300
- Reviewed Software Assurance Plan
- Conducted process audits
- Conducted product audits
- Recorded non-compliance process / product issues
- Resolved non-compliance process / product issues

### BSR Guidance: Sample Support Activities/Milestones (2 of 2)

As appropriate for the reporting period, address support activities and milestones such as those listed in the boxes on this and the previous slide.

#### **Measurement and Analysis**

- Defined, planned, and documented project measurement approach
- Obtained approval on measurement approach
- Defined project measures
- Established measurement collection repository
- Collected measures
- Analyzed and reported measures

#### **Requirements Management**

- Obtained requisite commitments to requirements
- Developed and updated bi-directional traceability matrix
- Identified and resolved inconsistencies in requirements

#### **Configuration Management**

- Defined, planned, and documented configuration management (CM) approach
- Obtained approval on CM approach
- Identified / documented configuration items
- Conducted CM Audits
- Held CCB Meetings
- · Placed n items under CM control
- Established deliverable baseline

### **BSR** Guidance: Sample Accomplishments Slide (1 of 2)

#### Management

- **Planned Activities** 
  - Establish configuration management approach
  - Obtain commitment on funding for FY05
- Accomplishments
- sample 1 Established the CM approach and obtained Branch Management approval
  - Prepared CM Plan draft and distributed it for review by the development, test, and customer teams
- Future Plans
  - Obtain commitment on funding for FY05
  - Deliver and obtain comments on Project Management Plan Review version

#### **Development**

- **Planned Activities**

### BSR Guidance: Sample Accomplishments Slide (2 of 2)

### Management

- Established the CM approach and obtained approval from Branch Management one week later than planned
- Prepared CM plan draft and distributed it for review by the development, test, and customer teams as scheduled
- Expected commitment on funding for FY05 was not received
- Plans for next month:
  - Obtain commitment on funding for FY05
  - Deliver and obtain comments on Project Management Plan Review version

#### Development

Started Build 1 as planned

- .....



### BSR Guidance: Issues / Concerns Slides

#### Minimum Requirements:

- Slide(s) must address the project's issues and concerns and include, at a minimum:
  - A brief description of the issue/concern
  - An analysis of the issue/concern
  - Specific impact(s) on your project
  - Specific internal and external groups/personnel that may be affected or need to be involved in resolving the issue/concern
- Preferred method of presentation:
  - Use any format that can fully describe the required items
  - Separate and identify technical issues/concerns slides from management issues/concerns
- See the next guidance slide for an example of an issues/ concerns slide

## BSR Guidance: Sample Issues/Concerns Slide

I D	ISSUE	ANALYSIS & IMPACT	ACTIO	N PLAN						
1	NIRSpec Focal Plane Electronics (FPE) ETU was removed from the deliverables list due to budgetary constraints	Analysis: With no ETU hardware and no simulators there will be no high fidelity testing of the data readout.  Impact: FSW will delay delivery of instrument by 3-4 months	Meet with Project to review impacts and decide on a course of action FSW to meet with NIRSpec Development Team to define a lower cost, test bench for FSW Development A duplicate EU FPE can be delivered to FSW if costs deemed acceptable.							
	STATUS									
	Progress: Received cost	SCHEDULI	ED DATES							
	concurrence from Project When we take receipt of t remains an issue.	DUE 12/15/04	COMPLETED							

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### BSR Guidance: Metrics Slides (1 of n)

- Minimum Requirements: Metrics Slide(s) must address the following project measures:
  - Progress and Cost Measures
    - Planned and Actual Support Activity Milestone Dates
      - Only needed here If support activities and associated milestones are not included on the Project Detailed Status (Slide 9) and the Deliverables / Receivables / Commitments Slide (Slide 11)
      - See BSR Guidance and examples (Slides 21 23)
    - Planned and Actual Effort (FTEs) by support activity
      - See example on Slide 33
    - Progress Tracking Points \*\*\*
      - Only needed here If progress tracking points are not included on the Project Detailed Status (Slide 9)
      - See BSR Guidance on Project Detailed Status slides (Slides 21 23)
      - See alternate example on Slide 34
    - Planned, Actual, and Estimate at Complete FTEs by CSCI \*\*\*
      - Only needed here If the project has more than one CSCI
      - See Staffing Summary Slides (Slides 6 and 7) for project level examples
  - Quality Measure
    - Number of defects by severity \*\*\*
      - See example on Slide 35

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<sup>\*\*\*</sup> For Class B, F, and G software, these measures must be reported for the entire project and for each CSCI

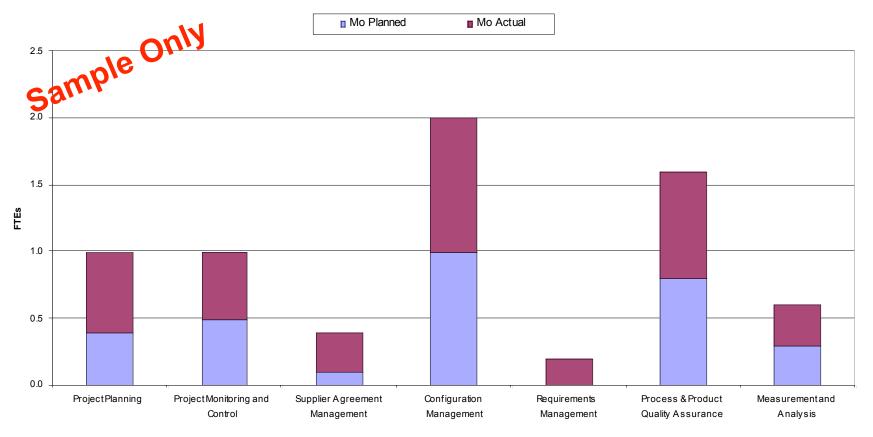
### BSR Guidance: Metrics Slides

- Minimum Requirements (continued):
  - Requirements Volatility Measures
    - Number of additions, changes, deletions to requirements \*\*\*
    - Number of requirements that are TBD \*\*\*
      - See examples on Slide 36
  - Risk Management Measures
    - Number of added, modified, and retired risks by severity
      - See examples on Slide 37
  - As planned, project-specific measures documented in the project's SMP/PP
    - Report project-specific measures according to the planned reporting frequency documented in the project's SMP/PP
- Preferred method of presentation:
  - Charts or graphs with words to show an analysis of the data in each

<sup>\*\*\*</sup> For Class B, F, and G software, these measures must be reported for the entire project and for each CSCI

### BSR Guidance: Sample Planned/Actual Support Effort Metrics Chart

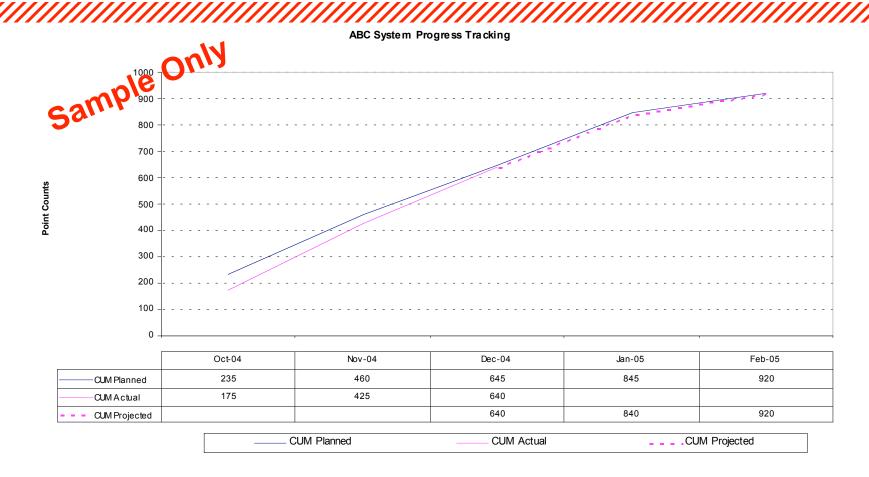
Planned / Actual Support Effort



#### **Support Activity Status:**

- Modifications to the supplier agreement were more difficult than anticipated; more assistance may be needed next month.
- Unexpected requirements changes required more staff than planned to perform requirements management. This also caused additional effort to be used to re-plan several builds.

### BSR Guidance: Sample Progress Tracking Metrics Chart

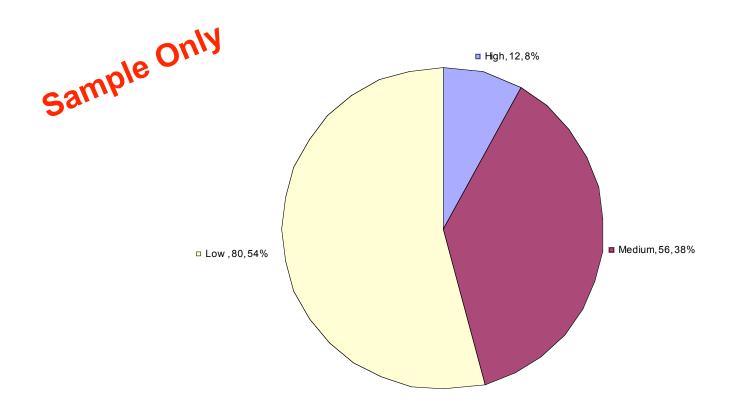


#### **ABC System Development Status:**

- No problems encountered to date. We expect to complete Build 1 of this CSCI as scheduled at the end of February.
- · Point count plans for Build 2 will also be presented at the next BSR.

### BSR Guidance: Sample Defects by Severity Metrics Chart

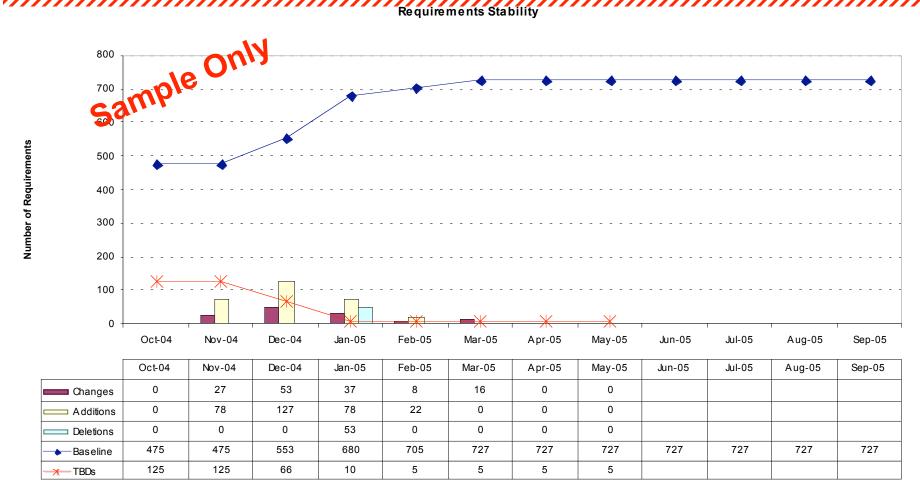
ABC System Defects by Severity



#### **Defects Status:**

• The quality of the ABC system continues to exceed expectations as only 12 high severity defects have been identified to date, with more than 95% of testing complete.

### BSR Guidance: Sample Requirements Volatility Metrics Chart



#### **Requirements Volatility Status:**

• Requirements have begun to stabilize since the SRR in February. We are continuing to work with the Project to resolve the remaining 5 TBDs before the PDR in August, one of which could cause significant impact.

### BSR Guidance: Sample Risk Management Metrics Chart

Sample Only

	Last	Currer	Total Open			
Risk Criticality	Reporting Period			Retired	Risks	
High	2	2 3 1		1	4	
Medium	4	0	0	2	2	
Low	8	1	5	0	9	
Totals	14	4	6	3	15	

#### **Risk Management Status:**

We opened 4 new risks during this reporting period. 3 of them are considered high criticality because they
all relate to our ability to meet the Project's critical End-To-End schedule (See details on the Risk Summary
Slide). We were, however, able to retire our most significant risk because the mitigation approach we
implemented was successful.

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